Orion Education

POLICY

POST-16 BURSARY

Approval Date	**2026/27 – AUTUMN TERM**
Review Date	**2026/27 – SUMMER TERM**
Owner	CFO

Policy Type		
	■	Trust Policy to be adopted in full
		Trust Policy adapted by the Academy
		Academy Policy

Approval Body		
	■	Executive
		Trust Board
		Local Advisory Body (LAB)

020 8290 8505
www.orionedu.org.uk
enquiries@orionedu.org.uk

Orion Education
Mansion House, Coopers School
Hawkwood Lane, Chislehurst,
Kent BR7 5PS

Our Four Critical Questions

Why do we exist?

To improve outcomes, transform lives and enable social mobility.

How do we behave?

Trust • Kindness • Endeavour

What do we do?

We create a strong network of schools which transform the lives of students by enabling them to achieve high educational and personal goals, regardless of their background.

How do we succeed?

Through a clear backbone, strong culture, academic rigour and smart systems.

PART A - Information

Introduction

Bursary funds are intended to help meet essential education-related costs based on individual financial need. The bursary funds are not intended to:

- provide learning support – services that institutions give to students – for example, counselling, mentoring or extra tutoring
- support extra-curricular activities where these are not essential to the students' study programme
- support general household incomes

An attendance threshold of below **95%** will trigger a letter informing students that, unless attendance improves, their bursary may be affected. We want to support students in need as far as possible, and all attendance issues will be considered on a case-by-case basis before a reduction is applied.

The value of the bursary payment may be reduced in line with the table below, should attendance levels drop as shown. Individual circumstances will be taken into account and discussed with you in advance.

- Attendance level of 95% or over — 100% bursary payment
- Attendance level of 90% to 94% — 75% bursary payment
- Attendance level of 85% to 89% — 50% bursary payment
- Attendance level below 85% — No bursary payment

Background

The Post-16 Bursary is funding provided to the school by the Government; therefore, administration and allocation of money will be subject to strict governance and audit regimes.

Payments are based on each student's individual circumstances and their actual financial need. These will vary from student to student, depending on, for example, their household income, the distance they need to travel to the institution, and the requirements of the course of study.

Should you qualify, you will need to apply by completing the **Bursary Application Form in Part B** and provide supporting evidence. All applications will be treated confidentially. Photocopies of documents will be taken and the originals returned to you as quickly as possible.

Types of Bursary / Entitlement Criteria

There are two types of Post-16 Bursary; a Vulnerable Bursary, and a Discretionary Bursary. To be eligible to receive either of these bursaries you must be aged over 16 and under 19 on 31 August at the end of the school year in which you are studying.

Vulnerable Bursary (V1)

Students within the defined vulnerable groups may be eligible for a bursary of up to £1,200 per year, and should be in one of the following:

- young person in care, including unaccompanied asylum-seeking children
- young care leaver
- receiving Income Support (IS), or Universal Credit (UC) because they are financially supporting themselves, or financially supporting themselves and someone who is dependent on them and living with them, such as a child or partner
- receiving Disability Living Allowance (DLA) or Personal Independence Payments (PIP) in their own right as well as Employment **and** Support Allowance (ESA) or UC in their own right
- Students who are parents must also be living independently of their own parents to qualify

If you are applying for this level of support, you will need to provide evidence in written form.

Suggested forms of evidence include:

- a letter from the Department for Work and Pensions (DWP) setting out the benefits to which you are entitled
- written confirmation of your current or previous looked after status from the local authority that looks after you, or provides you with other leaving care services

Discretionary Bursary (D1, D2 & D3)

Discretionary Bursaries are aimed at students who would not be able to stay in education without financial help. There are three types of Discretionary Bursary.

D1 enables students to claim a larger sum for educational expenses than D2 and D3.

The maximum award is £1,200 for D1 applicants and £900 for D2 applicants. However, the actual value of awards will depend on individual assessed need, the number of applications received and the availability of bursary funding.

Students will be considered for a D1 bursary where they demonstrate financial need and:

- are eligible for or in receipt of Free School Meals, and/or
- have a gross annual household income of £28,000 or less

Awards will be subject to assessment of need, compliance with the bursary criteria and the availability of funding.

You will qualify for the D2 bursary if:

- you have a household income between £28,001 and £35,000

To claim for the D3 bursary there must be exceptional circumstances that justify a specific one-off payment. Please speak to the Sixth Form Team if you think you may be eligible for this.

Students who are eligible for V1, D1 or D2 bursaries, and who have additional travel costs may be eligible for a higher value of bursary. Please make your Sixth Form Team aware of any travel costs you expect to incur.

Free School Meals (FSM) Guidance

Students aged 16 to 18 may also be eligible for the Government's 16 to 19 Free School Meals Scheme, which is separate from the Post-16 Bursary Fund.

Eligibility for 16 to 19 Free School Meals is determined in accordance with Department for Education guidance and is normally based on the student, or the household on which they are dependent, receiving a qualifying benefit.

Students who receive 16 to 19 Free School Meals are encouraged to apply for a bursary where they require additional financial support to participate in education. However, eligibility for Free School Meals does not automatically guarantee a bursary award. All discretionary bursary applications will be assessed against the school's published criteria, available funding and the student's individual financial circumstances.

Where a student is eligible for 16 to 19 Free School Meals, this may be used as supporting evidence of financial need when assessing an application for a Discretionary Bursary.

The school reserves the right to request additional evidence of household income or financial circumstances where necessary to ensure that bursary funding is allocated fairly and in accordance with Department for Education guidance.

Required evidence to support applications

All applications will need to be accompanied by evidence from you and your parent/carer.

Vulnerable Bursary (V1)

- proof of being a Child in Care or a Care Leaver
- young person in receipt of Income Support or Universal Credit (UC) in your own name
- young person in receipt of **either** Disability Living Allowance (DLA) or Personal Independence Payment (PIP) in your own name **and** Employment Support Allowance or UC in your own name

Discretionary Bursary (D1 & D2)

- **current Universal Credit Notice** (showing your total household income, as evidenced by your **three** most recent monthly Universal Award statements.), **or**
- **evidence of household benefits *assessed by HMRC*** *(e.g. Child Tax Credits or Income Support). Please ensure that the documentation shows the household income*

Discretionary Bursary (D3)

- **current Universal Credit Notice** (showing your total household income, as evidenced by your **three** most recent monthly UC Award statements.), **or**
- **evidence of household benefits *assessed by HMRC*** *(e.g. Child Tax Credits or Income Support). Please ensure that the documentation shows the household income,* **or**
- household wage slips covering the most recent **three-month** period

Your application should state the expenses/items you foresee needing financial support for. These may include; transport costs to and from school, books or equipment for courses, meals whilst in school, curriculum trips, visits and activities as part of your course, university open days and interviews, or any other costs related to your studies.

If additional costs arise during the course of the year, these can still be claimed for, providing they meet the criteria and you have not already received the maximum value of your approved bursary.

Claims for individual items are normally capped at £500. A claim for any single item above £500 would require a written request, to the Sixth Form Team for their consideration.

Inaccurate or fraudulent applications

By signing the **Post-16 Bursary Application Form** you agree that the information and evidence you provide in support of your application is correct and complete to the best of your knowledge.

False information given may mean that payments will cease, and that any overpayments will be recovered. Fraudulent applications will be referred to the DfE.

In order to receive financial support students must:

- meet School expectations relating to their conduct, progress and attendance
- maintain an attendance threshold of 95% or above
- attend any examinations for which you are entered
- have signed and returned the **Post-16 Bursary Application Form**
- comply with the Bursary Guidance and Eligibility Criteria

These aspects will be reviewed throughout the year using an academic tracking system of your progress and attendance.

Further conditions of funding

You are expected to keep and provide receipts for all items purchased directly by you. These receipts should match the value of bursary funding awarded. Copies of receipts should be submitted to your Sixth Form Team at the end of each term, in an envelope with your name and Tutor Group clearly marked on it. A reconciliation of funding paid, and costs incurred will take place at the end of each term. If receipts are not provided it may result in future payments being stopped and/or funds being recovered.

Making an application and by when

These should be completed and returned along with all supporting evidence no later than the last school day in September.

We are aware that personal circumstances may change during the year and an application after this date may be necessary. Please be advised, however, that late applications may mean reduced funds.

Should you need any further guidance please contact the School leader responsible for Sixth Form.

Data confidentiality

The Post-16 Bursary agreement is between the school and the student. To respect your confidentiality the school will only discuss payment and contract issues with you, the student. Students may invite a parent/carer to attend meetings regarding bursary matters.

When and how will I be able to access funding?

When your claim has been approved, depending on your application, you will be notified and either:

- receive termly payments
- payments will be made on your behalf or
- reimbursement will be made to you directly if you chose to pay upfront for approved items.

PART B – Application Form

- Prior to completing the form, please ensure you have read all the guidance notes
- We cannot process the application WITHOUT supporting evidence
- Please complete the form in capital letters and in black/blue ink

SCHOOL																			
Student Surname																			
Student First Name																			
ADDRESS																			
POSTCODE																			
TELEPHONE																			
EMAIL																			
DATE OF BIRTH			/			/													
NI NUMBER																			

Category of bursary being claimed

- Please refer to the Guidance Notes and tick as appropriate. All supporting evidence must be submitted in original format, with this application.

	Please tick	
V1		Young person in Care/Care Leaver/Student receiving financial support in own name as per guidance
D1		Eligible for 16-19 Free School Meals and/or household income up to £28,000
D2		Household income between £28,001 and £35,000
D3		Exceptional one-off need (evidence of household income required)

Supporting Evidence

V1 – see guidance notes for further details of evidence required to support claim

	Please tick
Are currently in Care (as defined by social services)	
Are leaving or have recently left Care	
Are in receipt of Income Support or Universal Credit in their own name	
Are disabled and in receipt of Disability Living Allowance or Personal Independence Payment in your own name **and** Employment Support Allowance or UC in own name	

D1, D2 and D3 - see guidance notes for further details of evidence required to support claim

	Please tick	Evidence Required
Income Support		An award letter which is less than three months old on the date of application
Income-based Employment and Support Allowance (ESA)		An award letter which is less than three months old on the date of application
Universal Credit		The last three months awards statements
Other Benefits/Pension (specify)		An award letter which is less than three months old on the date of application
Earned household income with no additional benefits (D3 only)		Include last three months of household wage slips

D3 – additional information needed

Exceptional Circumstances

Please enclose a supporting letter detailing:

(i) Where your financial circumstances are providing barriers to completing your course.

(ii) How a bursary award will support your continued studies /education. You should include details of how additional funding will allow you to meet the costs of items such as: Essential books and equipment Transport / Meals / Additional course costs, e.g. trips / Accommodation / Other items

(iii) Please provide an estimate of the costs of the items you need. You may be asked to provide evidence of expenditure

			PAYMENT TYPE Please tick preference			
Type of support	**Value to be claimed (£)**	**Further details**	**Pay to student via termly allowance**	**Student to buy and claim back on production of receipt**	**Order via the school**	**Payment in kind**
Transport to/from school						
Study books						
Curriculum trips						
Food allowance						
Equipment						
IT equipment						
Uniform/clothing for vocational courses						
UCAS registration						
University open days/interview costs						
Other (please specify)						
TOTAL						

Type of support

Please indicate in the 'Value to be claimed' column whether you wish to claim for costs, by following the guidelines below:

- **Transport** – please provide an expected value of what this will cost. Depending on the individual school/travel arrangements, this will either be paid to the relevant organisation directly or to the student to then make onward payment.
- **Study books** – please provide an expected value of what these will cost.
- **Curriculum trips** – please provide an expected value of what these will cost. These costs will be paid on your behalf (payment in kind).
- **Food allowance** – the value of this will depend on your school. Please indicate if you wish to claim for this and the school will calculate the amount to be allocated. This will then be added directly to your catering account by the school (payment in kind).
- **Equipment** - please provide an expected value of what this will cost and provide further detail as to what equipment will be purchased.
- **IT equipment** - please provide an expected value of what this will cost and provide further detail as to what IT will be purchased.
- **Uniform/clothing for vocational courses** - please provide an expected value of what this will cost and provide further detail as to what clothing will be purchased.
- **UCAS registration** – please provide expected value of what this will cost (payment in kind).
- **University open days / interview costs** - please provide an expected value of what this will cost and provide further detail as to what this will include.
- **Other** - please provide an expected value of what this will cost and provide further detail as to what this will include.

Please note – you are expected to keep and provide receipts for all items purchased directly by you. These receipts should match the value of bursary funding awarded. Copies of receipts should be submitted to your Sixth Form Team at the end of each term, in an envelope with your name and Tutor Group clearly marked on it. A reconciliation of funding paid, and costs incurred will take place at the end of each term. If receipts are not provided it may result in future payments being stopped and/or funds being recovered.

Payment type options:

- **Pay to student via termly allowance**
  Anything requested and approved in this category will be totalled up and paid to you in 3 termly instalments. A reconciliation of funding paid, and costs incurred will take place at the end of each term. If receipts are not provided it may result in future payments being stopped and/or funds being recovered.

- **Student to buy and claim back on production of receipt**
  If you chose to purchase an approved item from your own funds, we can then reimburse this cost to you, provided the receipt is provided and the items have been pre-approved.

- **Order via school**
  If you would like the Sixth Form Team to purchase a specific item on your behalf, please provide the exact details of the item and where it can be purchased from and this can be paid for directly from the bursary fund.

- **Payment in kind**
  This will include all items that can be paid for on your behalf, for example course fees, food allowance, curriculum trips and transport (depending on the individual school arrangements).

BANK DETAILS

Account details MUST be in the name of the Student

NAME OF BANK																			
BRANCH																			
ACCOUNT NAME																			
SORT CODE			-			-													
ACCOUNT NUMBER																			

DECLARATION

- I agree that the evidence provided in support of this application is correct and complete to the best of my knowledge and belief.
- I confirm that I have read and understood the guidance and criteria for the Post-16 Bursary fund and I am not in receipt of a Post-16 Bursary from another provider.
- I confirm that I will only spend my bursary allowance on items detailed on my approved application form.
- If my circumstances change, I will inform my school immediately and understand that this may affect future payments.

Signed (Student):
Print Name (Student):
Date:

Signed (Parent/Carer):
Print Name (Parent/Carer):
Date:

Submission of an application does not guarantee an award. Awards are made at the School's discretion, subject to eligibility criteria, assessment of financial need and the availability of funding.

Students who wish to challenge a bursary decision may submit a written appeal to the Head of Sixth Form within 10 school days of notification. Appeals will be reviewed by a senior leader whose decision will be final.

For Office Use Only	
Application received	Date:
Supporting evidence supplied	Yes / No
Supporting evidence returned	Yes / No
Category claimed	V1 / D1 / D2 / D3
FSM	Yes / No
Transport being claimed for	Yes / No
Application approved	Yes / No
Amount awarded:	£
Bank details provided	Yes / No / NA
Student Agreement signed and returned	Yes / No
Additional comments/information	